AUTODESK. UNIVERSITY

CS469514-L

A Checklist to Build Checklist Templates in BIM 360 Field Management

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About the speaker

Nauman Mysorewala

Autodesk Expert Elite, Architect, LEED AP

Revit Architecture and AutoCAD Certified Professional

Authorized Autodesk Services Marketplace provider

More than 25 years of experience with the Autodesk® family of products including AutoCAD®, AutoCAD Architecture, Revit®, BIM 360 & Navisworks®.

Presented at numerous times at AU and other conferences

Presented and moderated numerous Autodesk Build your IQ webinars for AutoCAD and Revit in collaboration with Autodesk.

Moderator for Autodesk Community Meetups for Architecture and BIM Management

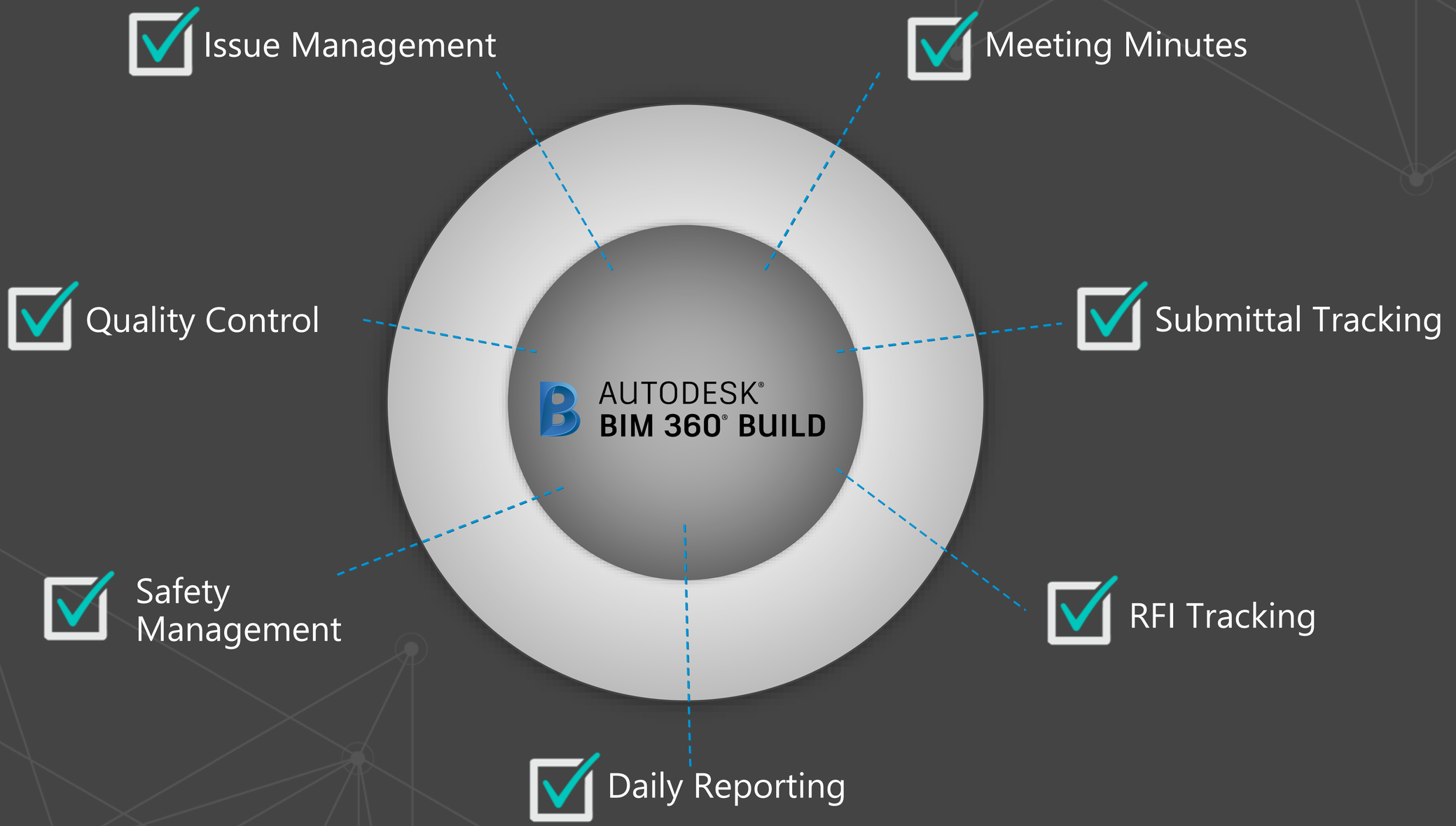
Educator at University of Cincinnati & Mount St. Joseph University teaching design technology applications.

Enjoys discovering new products and technologies and implementing them in the built environment.

Learning Objectives

- Learn about Account Admin and Project Admin roles in designing and implementing Checklist Templates.
- Learn how to easily create Quality, Safety, Commissioning, or Punch list Checklist Templates.
- Learn how to create Checklist Templates from scratch and configure checklist Items and integrate Issues.
- Learn how to link Checklist Templates to Assets and Asset Categories
- Learn how to export Checklist data

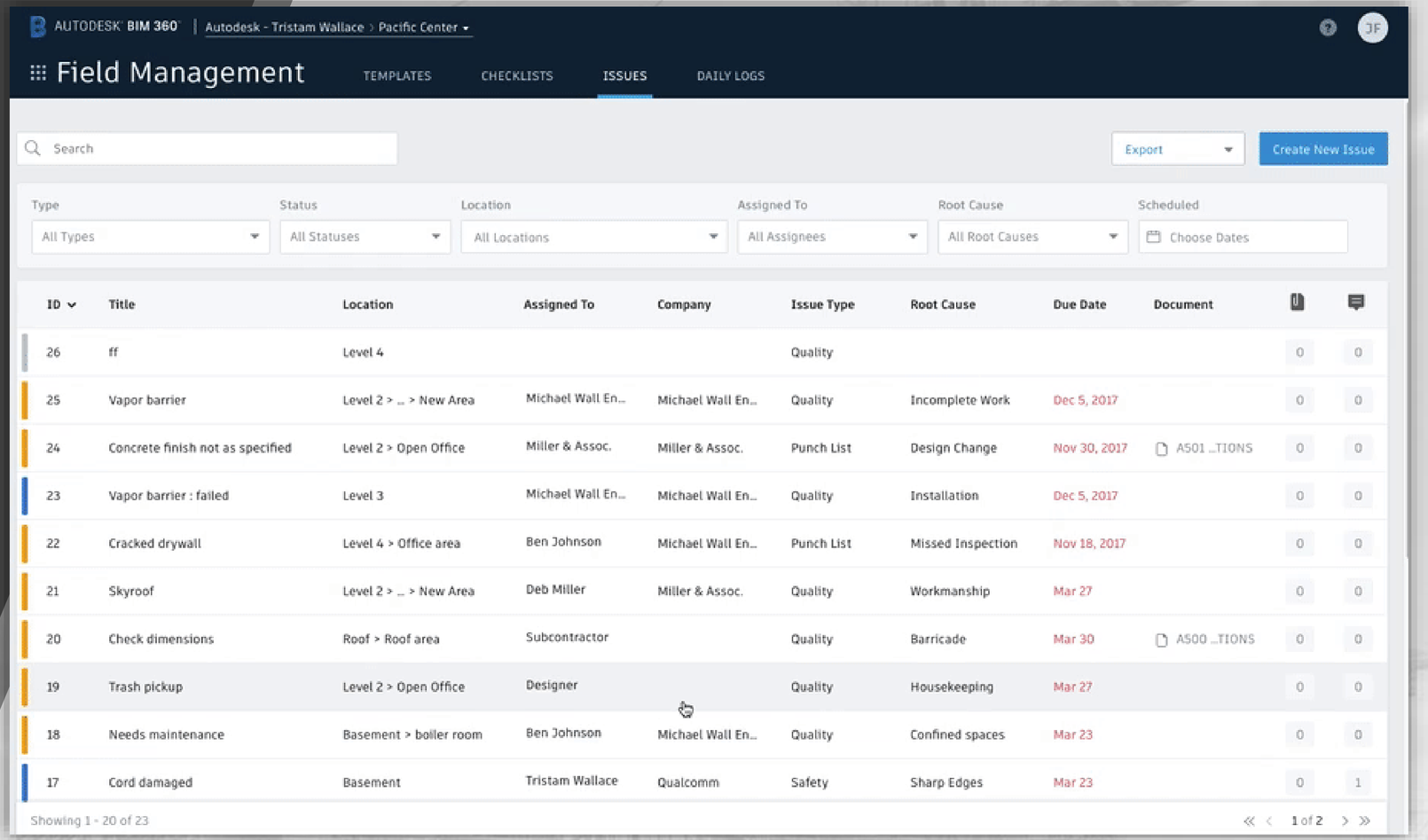
THE BIM 360 BUILD WORKFLOW



ISSUE MANAGEMENT

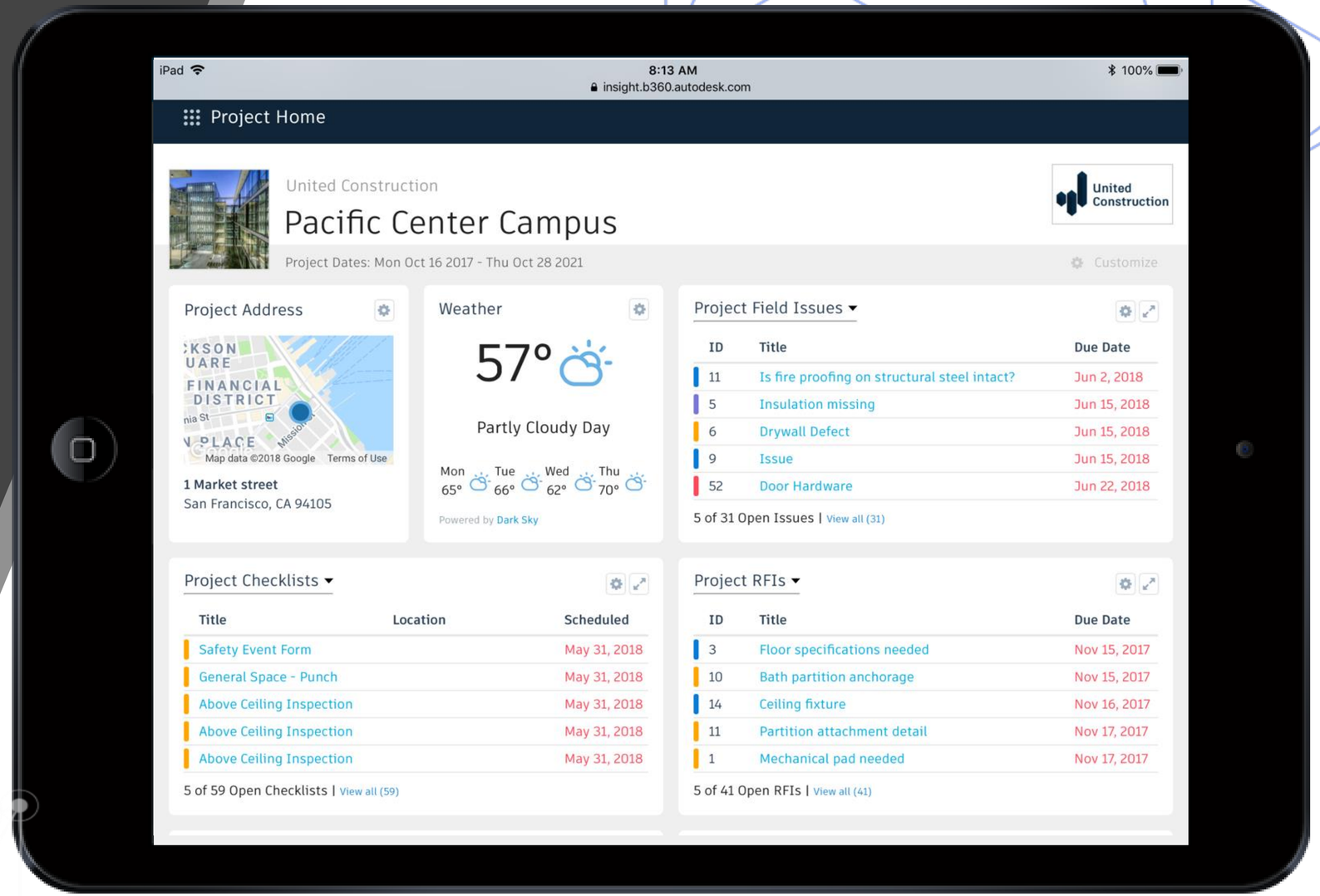
Create and assign issues and get insights into root causes

- Search, sort, track and export all Issues created
- Tag root causes to see where to focus attention
- Assign to team members by individuals, roles, or companies



CONNECTED

- Mobile
- Team collaboration
- Design to Construction

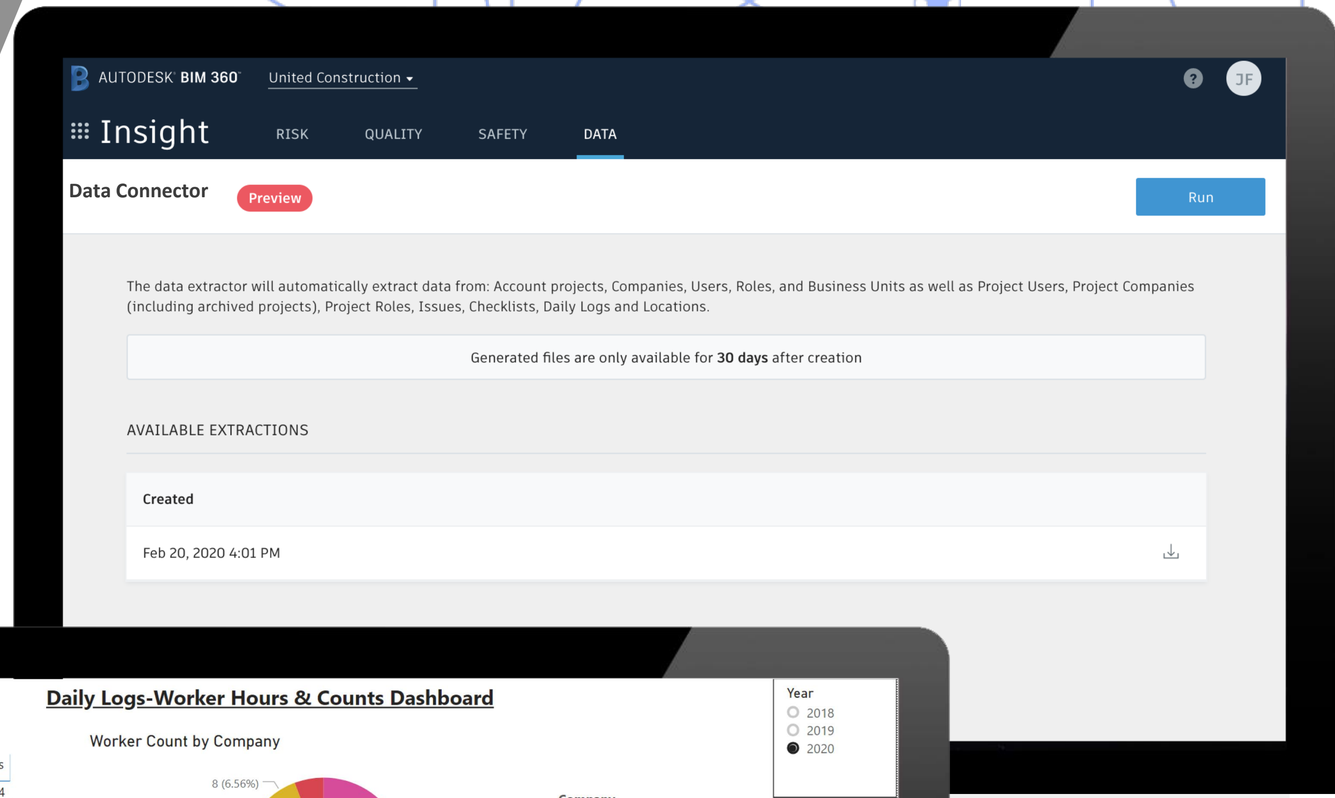


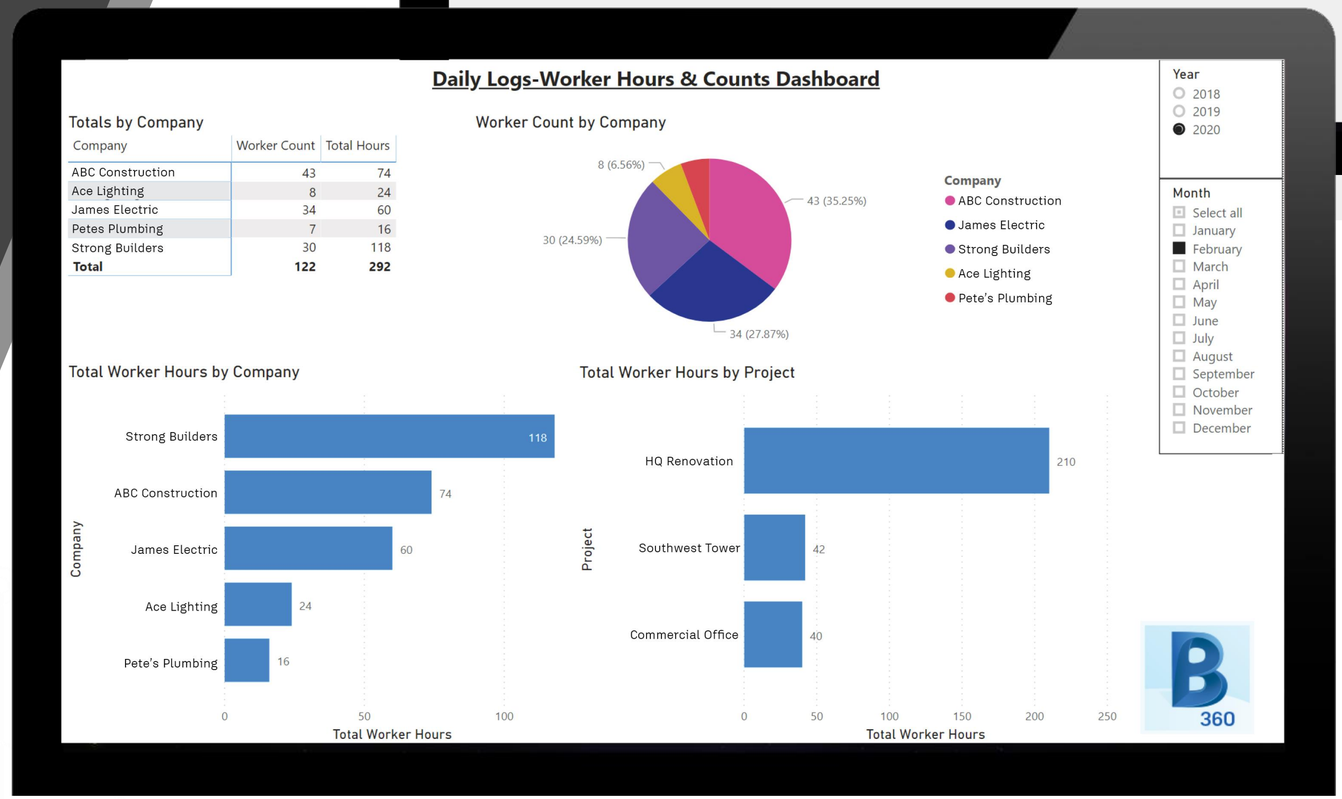
DATA CONNECTOR

PREVIEW RELEASE

One-click access to extract all your project data

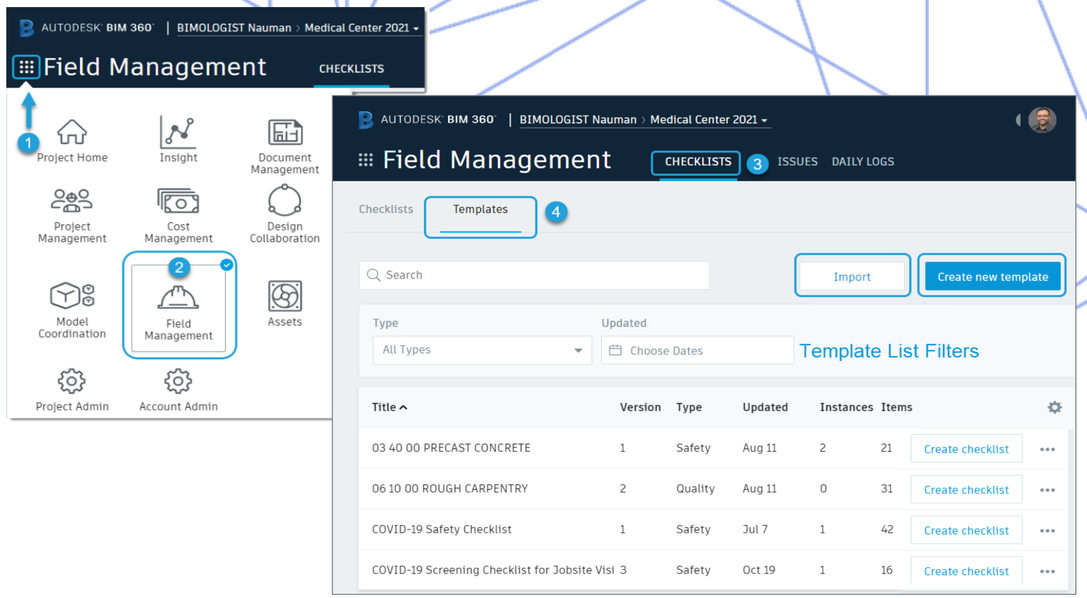
- Improve cross project data analysis
- Leverage capabilities of robust Business Intelligence tools
- No need to write a single line of code





Checklists

Checklists allow Project team to create standard forms to capture, review and follow through completion for quality and safety related tasks.



- Checklists are part of the Field Management module in BIM 360 Build
- Integrate with Issues feature for tracking and assignment of responsibility
- Integrates with Assets module
- Collected data used to analyze Assets nds via Insight on the Project Dashboard or export for use and analysis outside the BIM 360 ecosystem

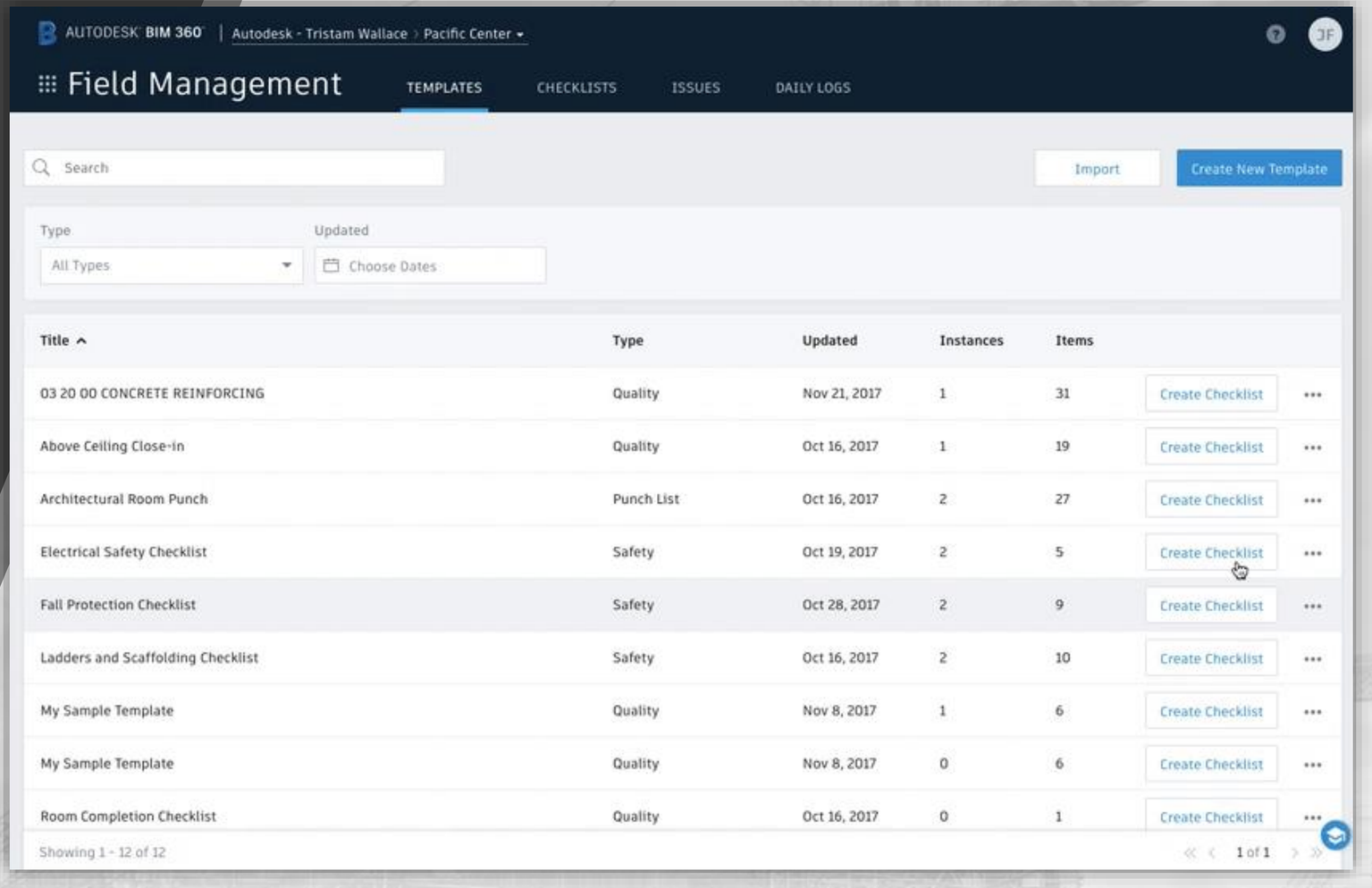
~~AUTODESK BIM 360 FIELD~~

AUTODESK BIM 360 | Field Management

QUALITY CONTROL

Import existing checklists or create from scratch

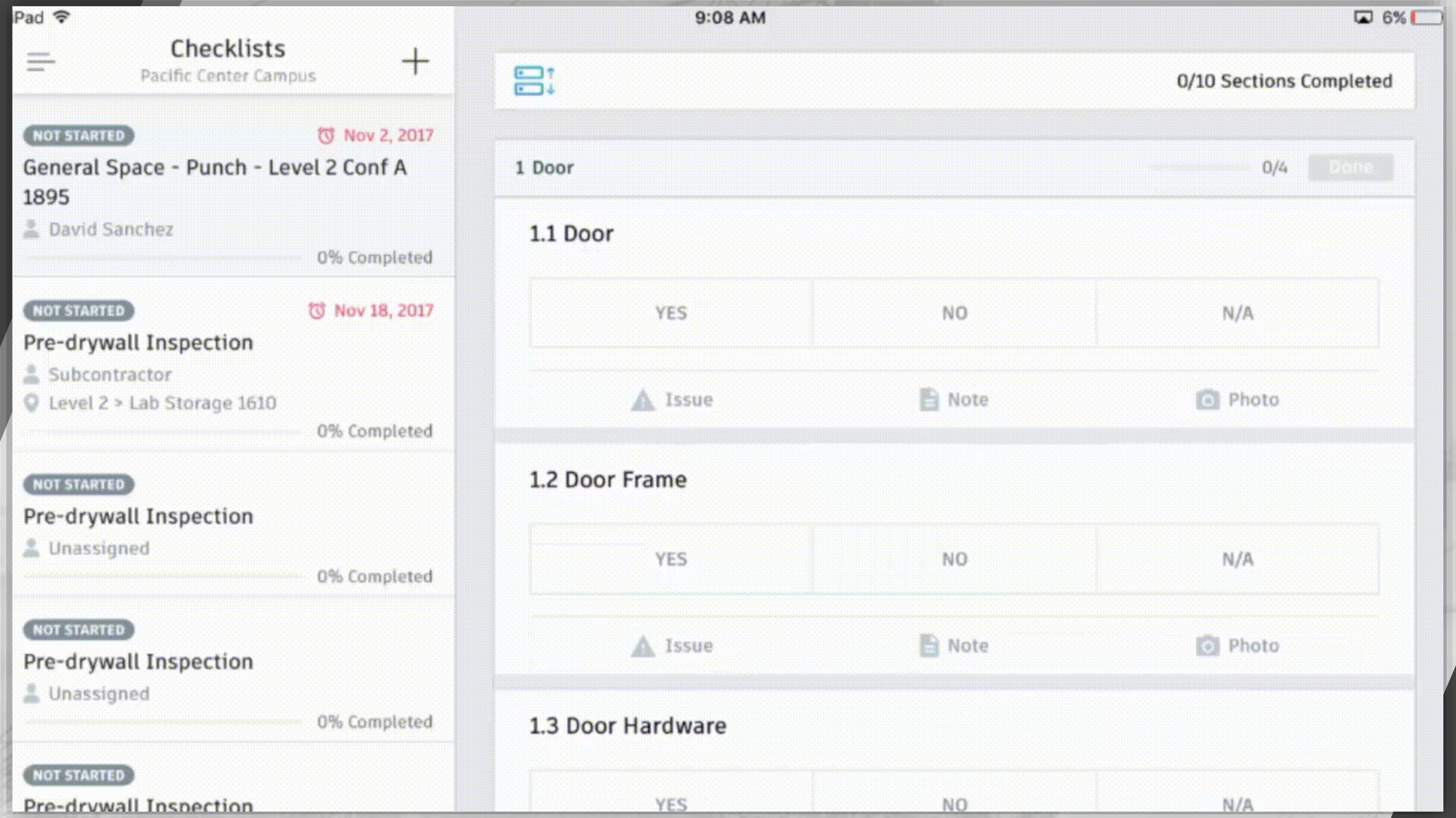
- Easily create quality, safety, commissioning or punch list checklists
- Use templates to build checklists from scratch
- Search, sort and track checklist completion



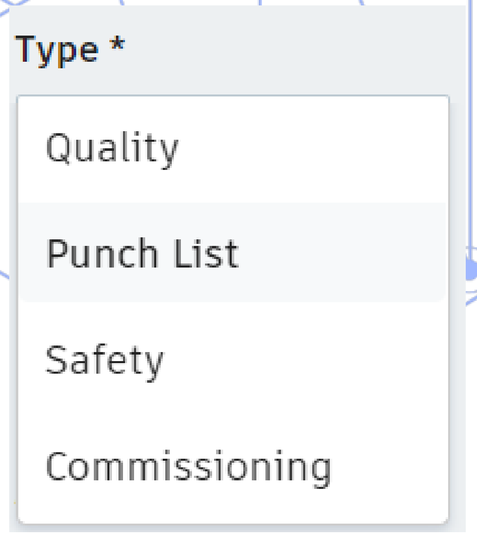
SAFETY MANAGEMENT

Encourage safety program adoption with routine inspections and reporting

- Document and share safety materials
- Assign nonconforming checklist observations
- Track and manage safety issues
- View reports and identify root cause



Checklists Categories and Types



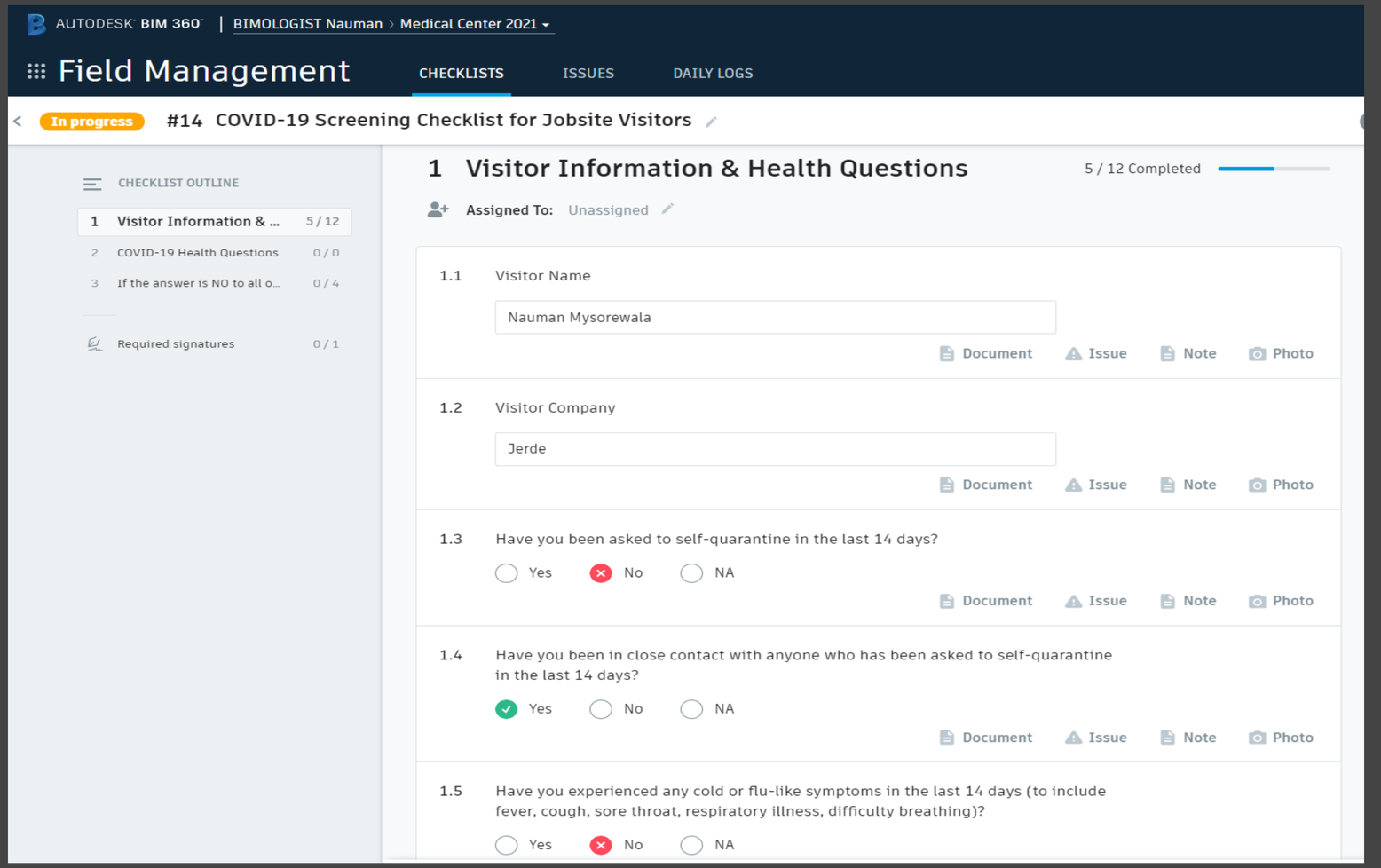
Safety Management

- SAFETY - Allows onsite staff to perform health and safety related inspections and capture data for compliance and tracking incidents

Quality Management

- QUALITY - Perform quality assurance checks.
- PUNCH LIST - Perform onsite inspections capturing and tracking quality issues and seeing them through completion
- COMMISSIONING - Validation of building performance and data capture

Checklist



Safety Checklist

Checklists Templates

For creating Checklists, there needs to be a Template defined to be used to create multiple Checklists

Two levels of Templates

Account-level Templates

- Only Account Admins of the managing company can create, update and publish templates to multiple projects.
- Multiple projects within the same account can utilize the templates
- Can be updated and republished across multiple projects

Project-level Templates

- Requires Project Admin rights to create or update templates
- Project Admins can allow other team members based on Company, Role, or individuals to create or update templates.
- Cannot be utilized by other projects within the same account

Templates cannot be exported to use in other accounts or projects!

Pre-requisites for Checklist Template Creation

CHECKLIST: Pre-requisites for Checklist Template Creation		
□	Autodesk ID	
□	BIM 360 Build license	
□	Project membership for non-Account-level templates	
	Required Permissions:	
	□	Account Admin for Account-level templates
	□	Project Admin for Project-level templates, Creating Checklists, Assigning User permissions
	□	Minimum Create permission for Templates and Checklists.
□	Internet connection	
□	Compatible web browser http://autode.sk/3mgj5wD Note: Template creation is not supported via the BIM 360 app	

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